



ISLAND OF IRELAND OVERSEAS TOURISM PERFORMANCE

Tourism Ireland
Marketing the island of Ireland overseas

2017 FACTS & FIGURES



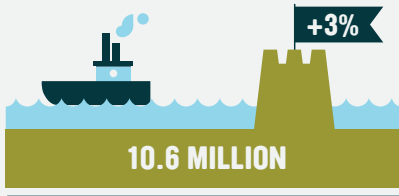
AN EXTRA +297,000
VISITORS PLUS
+€312m/£272m SPEND

BEST EVER YEAR
10.6 MILLION
OVERSEAS VISITORS

RECORD
€5.6b/£4.9b
REVENUE

OVERSEAS VISITORS

Over 10.6 million visitors were welcomed to the island of Ireland in 2017, almost +300k more than in 2016 (+3% increase).



WHERE DID THEY COME FROM?

GB [44%], US [15%], Germany [6%] & France [5%] represented seventy percent of all overseas visitors to the island in 2017.



AVERAGE SPEND AND LENGTH OF STAY

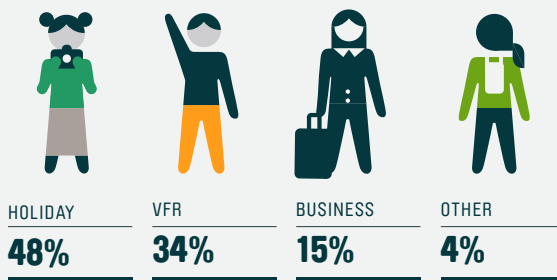
The average spend per overseas visitor was €525/£457 in 2017. The average length of stay for visitors was 7.6 nights and holidaymakers was 6.5 nights.



	GREAT BRITAIN		NORTH AMERICA
	MAINLAND EUROPE		OTHER AREAS

WHY WERE OUR VISITORS HERE?

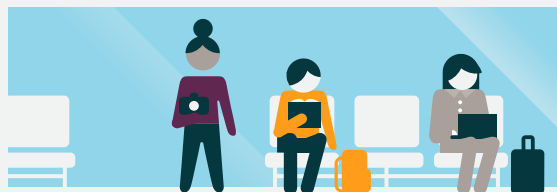
Almost half (48%) of all visitors to the island of Ireland in 2017 came for a holiday, that is +346,000 (+7%) more holidaymakers than in 2016. Approximately one-third (34%) came to visit friends and/or relatives (VFR) while almost one-sixth (15%) came for business reasons.



PROMOTABLE VISITORS*

More than 5.5 million promotable visitors were welcomed to the island in 2017, +369,000 more than in 2016.

+7%



OVERSEAS REVENUE

The island of Ireland generated €5.6/£4.9 billion in 2017.



WHERE DID THE REVENUE COME FROM?

GB [25%], US [25%], Germany [7%] & France [6%] represent almost two-thirds [63%] of all overseas revenue generated on the island in 2017.

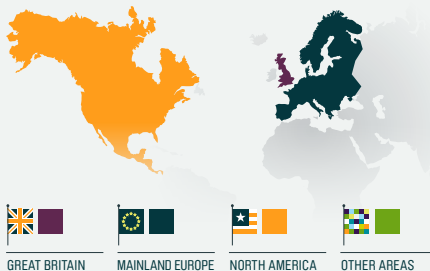


POPULAR PLACES?

Dublin, the South West and Northern Ireland remain the most popular destinations for visitors.

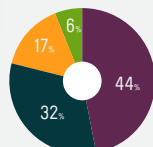


2017 NUMBERS & MARKET AREA SHARE



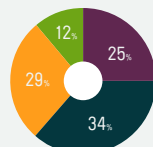
VISITORS
10,615,000

+3%
Change vs 2016



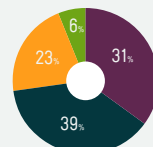
REVENUE
€5,575 million
£4,850 million

+6%
Change vs 2016



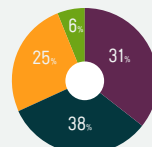
PROMOTABLES*
5,530,000

+7%
Change vs 2016



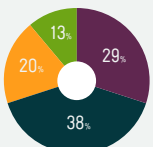
HOLIDAYMAKERS
5,082,000

+7%
Change vs 2016



NIGHTS
80,634,000

+3%
Change vs 2016



* Promotable visitors are made up of holidaymakers, conference, trade fair/exhibition visitors and visitors here for English Language Training (ELT).

“After 7 years of consecutive growth, 2017 was a record year with 10.6 million overseas visitors welcomed to the island of Ireland.”

WHERE DO OUR VISITORS COME FROM?

2017 was the 3rd consecutive record year with 10.6 million overseas visitors welcomed to the island of Ireland, and the 7th consecutive year of growth. Almost +300k more visitors than in 2016. Over half a million (584,000 or 5.5%) overnighted on both sides of the border.

Our Top Markets

Britain, the US, France and Germany remain our top four inbound markets to the island of Ireland. They account for 70% of visitors, 69% of holidaymakers, 63% of revenue and 60% of nights.

Diversification

As we continue to diversify into other markets, the share of visitors from these four markets continues to trend downwards and stands at 70% in 2017. This compares to 75% in 2007, while in 2003 it was 83%.

Long-haul

Three long-haul markets, the US, Canada and Australia, feature in our top 10 source markets.

Fastest Growing

The US, Spain, the Nordics and China were the fastest growing markets in volume terms in 2017. Combined they account for around +300k additional visitors compared to 2016.

While China (+43%), South Africa (+27%), Sweden (+27%) and Brazil (+21%) were the fastest growing markets in terms of growth rate.

“A record 5.1m overseas visitors came for a holiday in 2017, that is almost half (48%) of all visitors and 54% of revenue”



WHY WERE OUR VISITORS HERE?

Over 5 million overseas visitors came for a holiday in 2017, the 3rd consecutive record year for holidaymakers to the island of Ireland. Holidays represent almost half (48%) of all visitors in 2017. This compares with the 2.7m overseas holidaymakers recorded in 2010, when holidaymakers only accounted for 39% of all visitors.

Visiting Friends & Relatives (VFR)

By contrast, VFR trips account for a third (34%) of the island of Ireland's overseas visitors and nights (31%) but one fifth of all spend (22%). Northern Ireland continues to rely more heavily on those visiting friends and relatives (51%), particularly in terms of nights (59%).



WHERE DO OUR VISITORS COME FROM? (000's)

	Island of Ireland			Republic of Ireland			Northern Ireland		
	2017	vs. 2016	Share	2017	vs. 2016	Share	2017	vs. 2016	Share
Total	10,615	+3%		9,023	+3%		2,176	+9%	
	4,685	-4%	44%	3,445	-5%	38%	1,398	+1%	64%
	3,441	+5%	32%	3,256	+5%	36%	362	+1%	17%
GERMANY	667	+3%	6%	644	+3%	7%	66	-4%	3%
FRANCE	539	+3%	5%	512	+4%	6%	62	-0%	3%
SPAIN	435	+11%	4%	411	+11%	5%	46	+9%	2%
ITALY	352	+5%	3%	343	+5%	4%	24	-8%	1%
	1,801	+15%	17%	1,715	+16%	19%	257	+3%	12%
USA	1,576	+15%	15%	1,511	+17%	17%	196	-0%	9%
CANADA	225	+11%	2%	204	+11%	2%	61	+14%	3%
	688	+14%	6%	607	+14%	7%	159	+18%	7%
AUS & NZ	228	+1%	2%	207	+1%	2%	63	+4%	3%

	Holiday	VFR*	Business	Other
Total	48%	34%	15%	4%
	34%	48%	17%	1%
	56%	22%	16%	7%
	70%	18%	8%	4%
	46%	36%	13%	5%

VFR* – Visiting friends and relatives

HOW MUCH DID OUR VISITORS SPEND?



	Island of Ireland				Republic of Ireland				Northern Ireland			
	2017 €m	2017 £m	vs. 2016	Share	2017 €m	2017 £m	vs. 2016	Share	2017 €m	2017 £m	vs. 2016	Share
Total	5,575	4,850	+6%		4,924	4,284	+6%		651	566	+4%	
	1,413	1,229	-4%	25%	1,047	910	-6%	21%	366	319	+1%	56%
	1,881	1,636	+7%	34%	1,763	1,534	+6%	36%	118	102	+10%	18%
	1,617	1,407	+13%	29%	1,525	1,327	+14%	31%	92	80	-5%	14%
	665	578	+12%	12%	589	512	+10%	12%	76	66	+31%	12%

HOW DOES PURPOSE OF VISIT CONTRIBUTE TO SPEND?

More than half (54%) of all overseas revenue on the Island of Ireland in 2017 was generated from those who came for a holiday. This varies by market with holidaymakers accounting for 72% of revenue from North America, 56% of revenue from Mainland Europe and 38% of revenue from GB and Other Areas.

	VFR* – Visiting friends and relatives			
	Holiday	VFR*	Business	Other
Total	54%	22%	16%	8%
	38%	39%	21%	2%
	56%	13%	18%	13%
	72%	13%	10%	5%
	38%	32%	17%	13%

HOW DID THEY SPEND THEIR MONEY?

The overseas revenue generated on the island of Ireland reached record levels €5.6/£4.9 billion, the third consecutive record year. This is the third record year in a row for overseas revenue generated in both Northern Ireland and the Republic of Ireland. Food and drink is the most expensive element of a visit, followed by bed and board. This is true for all market areas.

	SS/Ents* – Sightseeing & Entertainment					
	Bed & Board	Food & Drink	SS/Ents*	Internal Transport	Shopping	Misc
Total	29%	36%	7%	12%	14%	2%
	27%	39%	6%	11%	12%	4%
	33%	34%	7%	13%	13%	2%
	29%	35%	7%	14%	14%	1%
	27%	36%	6%	11%	17%	3%



HOW MANY NIGHTS DID THEY STAY?

A record 80.6 million overseas bednights were recorded in 2017, that is a +22% increase in the last 10 years or almost +15m more bednights.

Quarter 3 (July–September) remains the busiest quarter, especially in terms of holiday nights. Greatest volume growth in bednights was recorded in Q4 in 2017.

Those travelling further tend to stay longer and this is true across all visitor types.

Average length of stay is inflated by those who came for reasons other than holidaying (6.5 nights), visiting friends and/or relatives (7.1 nights) and business reasons (6.7 nights). These 'other' reasons have an average stay of 27.9 nights and include those who came to learn English as a foreign language (English language training).

“A record 80.6m overseas bed nights were recorded in 2017, that is a +22% increase in the last 10 years.”



	2017 [000's]	vs. 2016	Average Stay	Share
Total	80,634	+3%	7.6	
	23,286	-0%	5.0	29%
	31,003	-1%	9.0	38%
	16,122	+10%	8/9	20%
	10,224	+14%	14.9	13%

WHERE DID THEY STAY?

	Friends/Relatives	Hotel	Rented	B&B/Guesthouse	Other
Total	30%	19%	19%	8%	24%
	54%	24%	8%	5%	10%
	21%	15%	21%	9%	34%
	19%	30%	20%	12%	20%
	27%	12%	32%	4%	25%

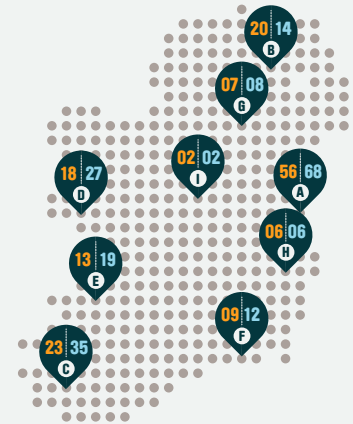


WHERE ON THE ISLAND OF IRELAND DID OUR VISITORS & HOLIDAYMAKERS STAY?

Overseas visitors included on average 1.5 regions on average in their trip in 2017, while holidaymakers included 1.9 regions. North Americans tend to travel more extensively than other market areas and this is true for both visitors (2.1 regions) and holidaymakers (2.4 regions).

	A	B	C	D	E	F	G	H	I
	Dublin	Northern Ireland	South West	West	Mid West	South East	Border	Mid East	Midlands
Visitors (000's)	5,936	2,176	2,439	1,911	1,387	954	746	633	218
Share	56%	20%	23%	18%	13%	9%	7%	6%	2%
Holidays (000's)	3,469	709	1,768	1,388	954	625	398	282	93
	68%	14%	35%	27%	19%	12%	8%	6%	2%

Dublin: Dublin City & County **Northern Ireland:** Antrim, Armagh, Down, Fermanagh, Derry/Londonderry, Tyrone **South West:** Cork, Kerry **West:** Galway, Mayo, Roscommon **Mid East:** Kildare, Meath, Wicklow **South East:** Carlow, Kilkenny, Tipperary (South), Waterford, Wexford **Border:** Cavan, Donegal, Leitrim, Monaghan, Sligo, Louth **Mid West:** Clare, Limerick, Tipperary (North) **Midlands:** Laois, Longford, Offaly, Westmeath.



% HOLIDAYMAKERS % VISITORS

WHERE DID OUR HOLIDAYMAKERS COME FROM?

Almost two-fifths (38%) of all holidaymakers came from Mainland Europe. Our dependence on the British market continues to reduce as their share now stands at 31%, compared with 45% a decade ago. Strong growth in holidaymakers from North America has seen the share of holidaymakers from this region grow from 17% in 2007 to 25% in 2017. The remainder came from Other Areas, which has practically doubled (increase of +96%) in the past decade, which has practically doubled (increase of +96%) in the past decade.

	2017 (000's)	vs. 2016	Share
Total	5,082	+7%	
	1,594	-5%	31%
	1,911	+10%	38%
	1,261	+20%	25%
	316	+20%	6%



WHERE DID OUR PROMOTABLE VISITORS* COME FROM?

Given that holidaymakers make up the majority (92%) of promotable visitors, it is not surprising that the share by market area mirrors to a great extent that of holidaymakers. The other two elements that make up the almost half a million (448k) promotable visitors are promotable business visitors (308k) and English Language Training visitors (140k). Britain and Mainland Europe each contribute about 125k promotable business visitors while most (86%) of language students come from Mainland Europe.

*Promotable visitors are made up of holidaymakers, conference, trade fair/exhibition visitors and visitors here for English Language Training (ELT).

	2017 (000's)	vs. 2016	Share
Total	5,530	+7%	
	1,722	-5%	31%
	2,157	+9%	39%
	1,292	+19%	23%
	359	+18%	6%

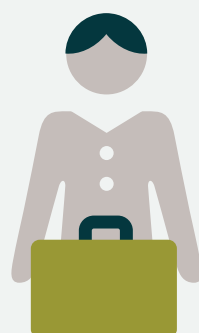
HOLIDAYMAKER PROFILES

WHAT SOCIO ECONOMIC GROUP DO OUR HOLIDAYMAKERS BELONG TO?

The island of Ireland continues to attract a high proportion of white collar/managerial/professional (ABC1) holidaymakers (86%), (less so from Britain (73%)).

	AB Managerial Professional	C1 White Collar	C2 Skilled Worker	DE Unskilled Worker
Total	27%	59%	10%	4%
	22%	51%	20%	7%
	25%	62%	10%	3%
	29%	62%	7%	3%
	32%	57%	7%	3%

**WHITE
COLLAR
59%**



HOW LONG DID OUR HOLIDAYMAKERS STAY?

The marginal decline in average length of stay observed in recent years has continued in 2017 from 6.8 nights in 2013, 6.7 nights in 2014, 6.6 nights in 2015 and 2016 to 6.5 night in 2017. This trend is largely observed for both holidays in Northern Ireland (3.1 nights) and the Republic of Ireland (6.5 nights).

	1-3 nights	4-5 nights	6-8 nights	9-14 nights	15+ nights	Average nights
Total	30%	19%	26%	19%	6%	6.5
	46%	19%	17%	11%	6%	4.5
	27%	21%	26%	19%	7%	6.9
	21%	17%	32%	25%	6%	7.8
	31%	20%	29%	13%	7%	8.8

WHAT AGE ARE OUR HOLIDAYMAKERS?

More than half (54%) of all holidaymakers are 35 years of age or older, though this differs by market area with an older holidaymakers from Britain (61% over 35 years) and younger holidaymaker from Mainland Europe (53% are under 35 years).



	U16	16-24	25-34	35-44	45-54	55-64	65+
Total	4%	17%	26%	13%	16%	15%	10%
	4%	12%	23%	14%	19%	16%	13%
	5%	19%	29%	14%	17%	11%	5%
	3%	17%	24%	10%	14%	17%	14%
	2%	16%	22%	11%	16%	21%	12%

HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

It was a first visit to the island of Ireland for two-thirds (67%) of holidaymakers in 2017, this reflects a significantly higher proportion than a decade ago (58%). The island of Ireland continues to attract the highest incidence of repeat visitors from Britain and one-in-twelve visits from Britain are made by people born on the island of Ireland.



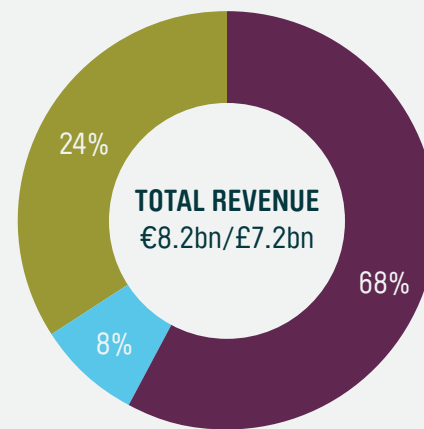
	1st visit	Repeat	Born here
Total	67%	31%	2%
	40%	52%	8%
	74%	26%	0%
	75%	25%	0%
	81%	19%	0%

TOURISM CONTEXT

ALL TOURISM ON THE ISLAND OF IRELAND IN 2017 DOMESTIC AND OVERSEAS

In addition to the €5.6/£4.9 billion generated by overseas visitors, a further €2.0/£1.7 billion was generated by residents of the Republic of Ireland, with the balance (€684/£595 million) coming from Northern Ireland residents. Overseas visitors continue to be the most important source of tourism for the island of Ireland, accounting for 44% of trips, 68% of spend and 69% of nights.

“€8.2bn/£7.2bn in revenue was generated from tourism on the island of Ireland in 2017.”



OVERSEAS RESIDENTS

10.6m Trips

€5.6/£4.9bn (68%)

NORTHERN IRELAND RESIDENTS

3.5m Trips

€684/£595m (8%)

REPUBLIC OF IRELAND RESIDENTS

10.1m Trips

€2.0/£1.7bn (24%)

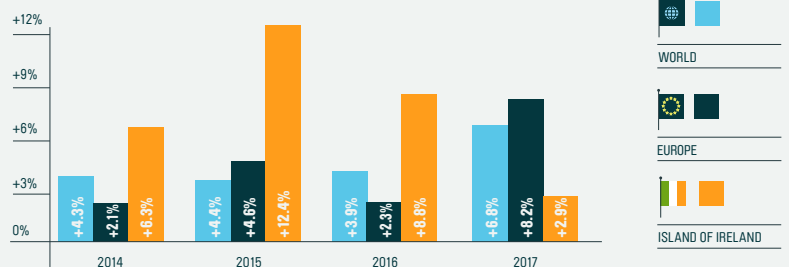
GLOBAL TOURISM TRENDS

The island of Ireland revenue growth kept pace with Global revenue growth, however the growth recorded in overnight tourists for both the World (+6.8%) and Europe (+8.2) outpaced that recorded for the island of Ireland (+2.9%), for the first time in five years.

This was the strongest year for over seven years for World travel. Europe, a mature destination, delivered particularly strong results following more modest growth in 2016.

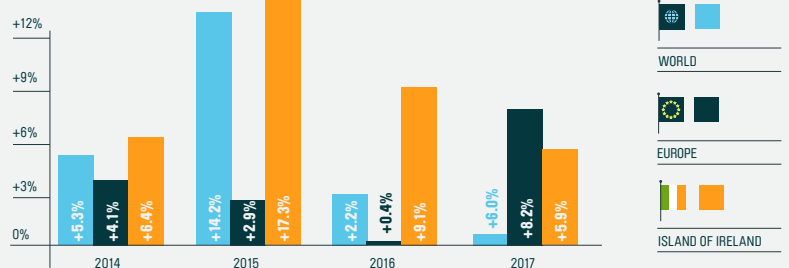


WORLD/EUROPE/ISLAND OF IRELAND TOURISTS: YEAR-ON-YEAR % CHANGE



Source: Oxford Economics

WORLD/EUROPE/ISLAND OF IRELAND REVENUE: YEAR-ON-YEAR % CHANGE



Exchange rates used to determine spending in euros varies over time, and is not equal to the exchange rate used in the Tourism Ireland Model
Source: Oxford Economics

For further detail or copies of any of our research publications please visit our website: www.tourismireland.com



FURTHER INFORMATION...

Tourism Ireland is the organisation responsible for marketing the island of Ireland overseas as a tourist destination. In addition to this role Tourism Ireland also undertakes regional / product marketing and promotional activities on behalf of Fáilte Ireland and Tourism Northern Ireland through its overseas market offices.

All the information contained within this publication is based on information provided by NISRA's Northern Ireland Passenger Survey, the CSO's Country of Residence Survey and the Passenger Card Inquiry and Fáilte Ireland's Survey of Overseas Travellers. We would like to thank NISRA, Fáilte Ireland, the CSO and Tourism Northern Ireland for their assistance to Tourism Ireland in compiling Overseas Tourism Performance 2017.

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